RETAIL TRADE





Maryland
Department of Labor, Licensing and Regulation
Division of Workforce Development
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Retail Trade Cluster

What is included in the Retail Trade Cluster?

The Retail Trade Cluster comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. Retailing is the final step in the distribution of goods to consumers. The Retail Trade Cluster includes all of the industry groups that comprise the North American Industry Classification System (NAICS) sector of Retail Trade. The sector is composed of two main types of retailers: store and nonstore retailers.

Store Retailers operate fixed point-of-sale locations, designed to attract a high volume of walk-in customers. They typically sell goods to the general public for personal or household consumption, but some also serve business and institutional clients. In addition to retailing merchandise, some types of store retailers also provide after-sales services such as installation and repair. Store retailers include:

NAICS

- 4411 Automobile dealers
- 4412 Other motor vehicle dealers
- 4413 Auto parts, accessories, and tire stores
- 4421 Furniture stores
- 4422 Home furnishings stores
- 4431 Electronics and appliance stores
- 4441 Building material and supplies dealers
- 4442 Lawn and garden equipment and supplies stores
- 4451 Grocery stores
- 4452 Specialty food stores
- 4453 Beer, wine, and liquor stores
- 4461 Health and personal care stores
- 4471 Gasoline stations
- 4481 Clothing stores
- **4482** Shoe stores
- 4483 Jewelry, luggage, and leather goods stores
- **4511** Sporting goods and musical instrument stores
- 4512 Book, periodical, and music stores
- 4521 Department stores
- 4529 Other general merchandise stores
- 4531 Florists
- 4532 Office supplies, stationery, and gift stores
- 4533 Used merchandise stores
- 4539 Other miscellaneous store retailers.

Nonstore Retailers also cater to the general public, but reach their customers and market merchandise using different methods than store retailers. Broadcast advertising and "infomercials", published direct-response advertising, paper and electronic catalogs, door-to-door sales, vending machines, street vendors (except food), and direct (nonstore) sale and delivery of products typify the business practices of nonstore retail establishments. This group includes:

NAICS

- **4541** Electronic shopping and mail-order houses
- **4542** Vending machine operators
- 4543 Direct selling establishments

For additional descriptive information on NAICS, go to www.census.gov/epcd/naics02/

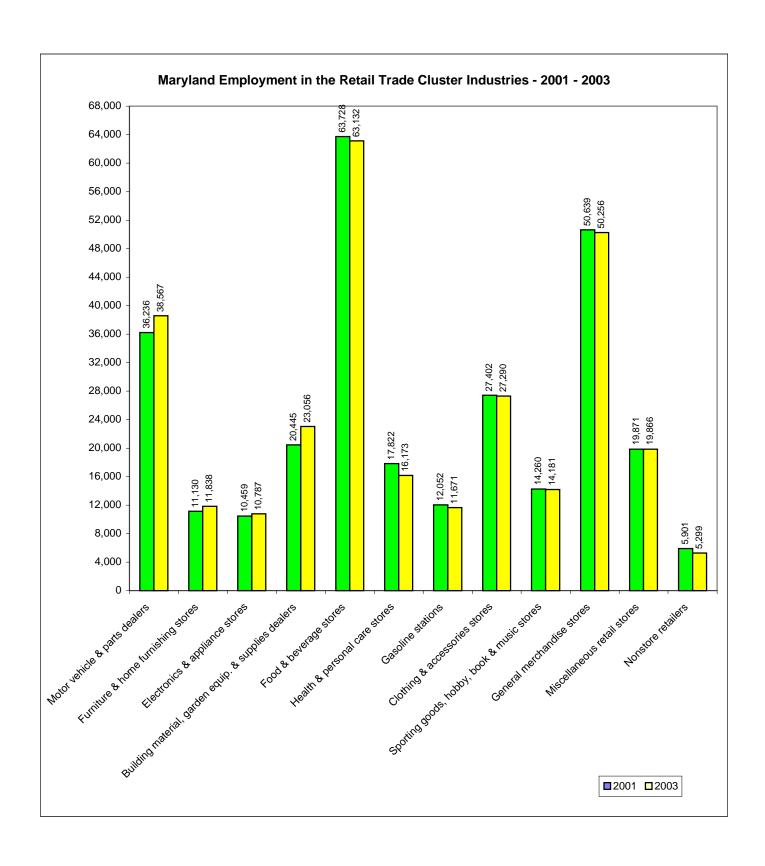
This publication was developed using data from the Quarterly Census of Employment and Wages (ES 202) and from the Occupational Employment Statistics (OES) Programs.

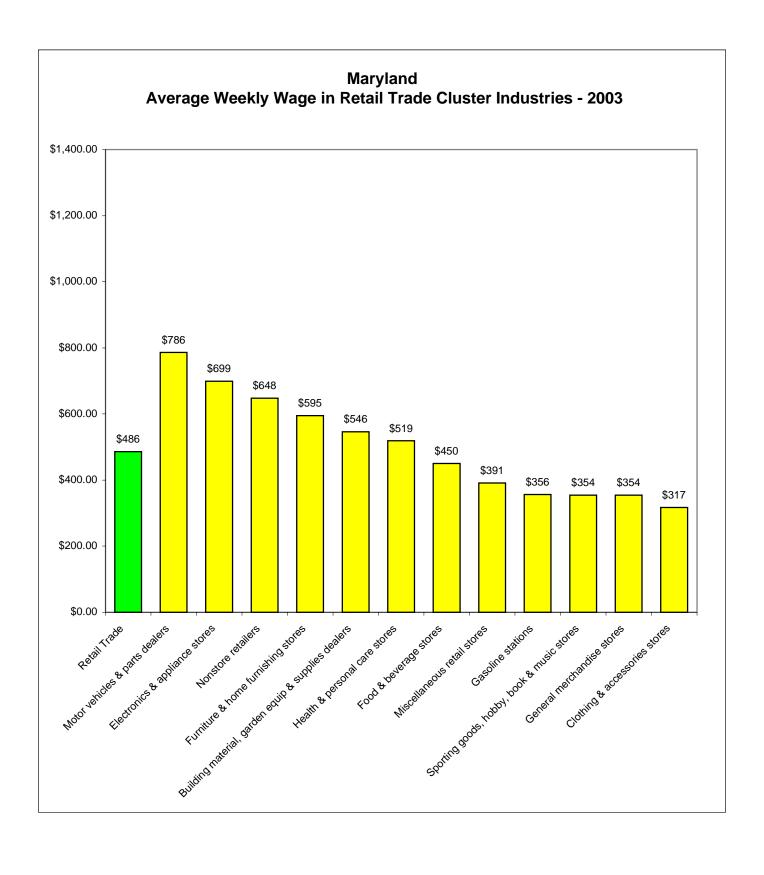
Maryland
Employment and Wages in the Retail Trade Cluster Industries

		Employment Payroll		Average Wkly Wage	Industry Share of		
NAICS	Industry Description	2001	2003	2001	2003	2003	Cluster
	Retail Trade	292,154	293,484	\$6,909,816,305	\$7,414,773,497	\$486	100.0
	Store Retailers	284,044	286,817	6,627,463,627	7,160,229,421	480	97.7
	Motor Vehicle and Parts Dealers	36,236	38,567	1,429,041,874	1,575,423,759	786	13.1
4411	Automobile dealers	25,579	27,320	1,127,975,510	1,238,689,699	872	9.3
4412	Other motor vehicle dealers	2,463	2,635	79,067,358	91,379,660	667	0.9
4413	Auto parts, accessories & tire stores	8,194	8,612	221,999,006	245,354,400	548	2.9
	Furniture and Home Furnishing Stores	11,130	11,838	326,254,826	366,522,386	595	4.0
4421	Furniture stores	6,009	6,599	190,932,840	212,583,203	620	2.2
4422	Home furnishing stores	5,121	5,239	135,321,986	153,939,183	565	1.8
4431	Electronics and Appliance Stores	10,459	10,787	388,812,504	392,363,470	699	3.7
	Building Material, Garden Equipment						
	and Supplies Dealers	20,445	23,056	564,904,037	654,133,010	546	7.9
4441	Building material and supplies dealers	17,140	19,905	495,167,373	581,156,739	561	6.8
4442	Lawn, garden equip. & supplies stores	3,305	3,151	69,736,664	72,976,271	445	1.1
	Food and Beverage Stores	63,728	63,132	1,377,028,812	1,478,905,385	450	21.5
4451	Grocery stores	53,505	52,958	1,167,136,210	1,245,333,886	452	18.0
4452	Specialty food stores	4,439	4,250	92,682,527	97,182,994	440	1.4
4453	Beer, wine & liquor stores	5,784	5,924	117,210,075	136,388,505	443	2.0
4461	Health and Personal Care Stores	17,822	16,173	432,195,424	436,494,726	519	5.5
4471	Gasoline Stations	12,052	11,671	211,110,925	216,187,431	356	4.0
	Clothing and Accessories Stores	27,402	27,290	434,423,803	449,559,603	317	9.3
4481	Clothing stores	19,725	19,662	286,434,191	296,495,130	290	6.7
4482	Shoe stores	4,232	4,173	63,065,456	64,212,972	296	1.4
4483	Jewelry, luggage & leather goods stores	3,445	3,455	84,924,156	88,851,501	495	1.2
	Sporting Goods, Hobby, Book						
	and Music Stores	14,260	14,181	234,767,303	261,387,299	354	4.8
4511	Sporting gds, hobby & musical instr. stores	9,428	9,454	158,249,640	179,610,446	365	3.2
4512	Books, periodical & music stores	4,832	4,727	76,517,663	81,776,853	333	1.6
	General Merchandise Stores	50,639	50,256	834,108,907	924,863,838	354	17.1
4521	Department stores	39,344	37,844	623,526,191	667,310,398	339	12.9
4529	Other general merchandise stores	11,295	12,412	210,582,716	257,553,440	399	4.2
	Miscellaneous Retail Stores	19,871	19,866	394,815,212	404,398,514	391	6.8
4531	Florists	2,617	2,487	40,358,336	39,401,727	305	0.8
4532	Office supplies, stationery and gift stores	8,648	8,413	205,242,361	205,765,568	470	2.9
4533	Used merchandise stores	3,071	3,021	49,520,209	51,978,871	331	1.0
4539	Other miscellaneous store retailers	5,535	5,945	99,694,306	107,252,348	347	2.0
	Nonstore Retailers	5,901	5,299	179,119,014	178,461,526	648	1.8
4541	Electronic shopping & mail-order houses	1,689	963	41,711,002	28,753,980	574	0.3
4542	Vending machine operators	883	1,069	21,814,206	23,805,050	428	0.4
4543	Direct selling establishments	3,329	3,267	115,593,806	125,902,496	741	1.1
	Nondistributable	2,209	1,368	103,233,664	76,072,550	1,069	0.5

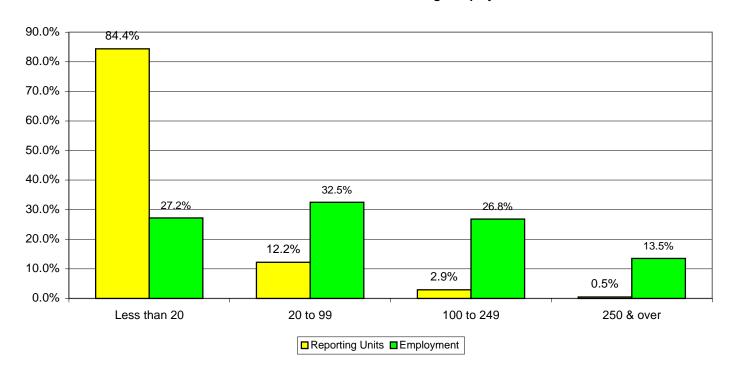
- Performance in the Retail Trade Cluster has been relatively muted over the past few years. The economic slowdown during the 2001-2003 period, as might be expected, curtailed growth among consumer-sensitive industries. Growth in retail trade was limited to less than 1% through 2003, yielding a net gain of 1,330 jobs in the cluster.
- Among the detailed cluster industries, building material and supplies dealers a feeder industry for construction activity turned in the best performance, adding about 2,765 jobs through 2003. Noteworthy gains were also reported among automobile dealers an industry which drew customers by offering low interest financing and other monetary incentives. In building material and supplies dealers, the largest gains were reported in the Mid-Maryland Area. Among automobile dealers, employers in the Montgomery Workforce Area showed the greatest expansion.

^{*} Includes establishments in the Retail Trade Cluster NAICS industries that cannot be distributed geographically.





Reporting Units and Employment Concentration in the Retail Trade Cluster by Size Class Based on 4th Quarter 2003 Average Employment



		Reporti	ng Units		Employment			
	Less than 20	20 to 99	100 to 249	250 & over	Less than 20	20 to 99	100 to 249	250 & over
Retail Trade Cluster	14,935	2,167	512	93	77,103	92,097	75,833	38,404
Percent of Total	84.4%	12.2%	2.9%	0.5%	27.2%	32.5%	26.8%	13.5%

- Close to 85% of all businesses in the Retail Trade cluster are staffed by less than twenty workers. Among
 the detailed industries in the cluster, the highest density of small businesses are found in gasoline stations.
 Nearly 93% of all businesses in this industry fall within this size class--a stratification where nearly
 three-fourths of the industry's total jobs are centered.
- Less than 1% of all businesses in the cluster are classified as large employers (250 or more workers).
 Department stores account for nearly 50% of all the cluster's large employers. About 4 out of every 10 jobs in this size class are within department stores.

^{*} Includes establishments in all Retail Trade NAICS industries that cannot be distributed geographically.

Maryland
Occupations Typically Associated with the Retail Trade Cluster

	Annual Openings				Median
				Training	Hrly/Annual
Occupation	Growth *	Replacements *	Total *	Code	Wage
Retail Salespersons	970	2,820	3,790	11	\$8.75
Cashiers	955	3,045	4,000	11	8.50
Stock Clerks and Order Fillers	0	1,230	1,230	11	10.00
First Line Supervisors/Mgrs. Of Retail Sales Workers	415	635	1,050	8	16.00
Laborers and Freight, Stock and Material Movers, Hand	175	1,280	1,455	11	10.50
General and Operations Managers	1,420	1,230	2,650	4	35.50
Truck Drivers, Heavy	325	390	715	10	17.00
Truck Drivers, Light or Delivery Services	480	190	670	11	13.25
Automotive Service Technicians and Mechanics	195	455	650	7	17.25
Customer Service Representatives	735	485	1,220	10	14.00
Office Clerks, General	695	1,165	1,860	11	12.50
Shipping, Receiving and Traffic Clerks	15	210	225	11	12.75
Bookkeeping, Accounting and Auditing Clerks	150	550	700	10	14.75
Industrial Truck and Tractor Operators	120	175	295	11	13.75
First Line Sups./Mgrs. Of Office/Admin. Support Workers	290	620	910	8	14.00
Counter and Rental Clerks	205	335	540	11	10.00
Parts Salespersons	0	110	110	10	13.75
Secretaries, exc. Legal, Medical and Executive	230	835	1,065	10	13.75
Sales Managers	280	155	435	4	36.50
Pharmacy Technicians	100	50	150	10	12.00
Janitors and Cleaners	1,165	745	1,910	11	8.75
Butchers and Meat Cutters	0	60	60	9	15.00
First Line Sups./Mgrs. Of Mechs., Installers & Repairers	140	205	345	8	23.50
Cleaners of Vehicles and Equipment	60	190	250	11	8.50
Pharmacists	115	85	200	1	39.50
Order Clerks	0	75	75	11	14.00
Wholesale and Retail Buyers	15	65	80	8	20.50
Computer Support Specialists	315	135	450	6	21.50
Financial Managers	295	210	505	4	34.50
Billing and Posting Clerks	70	125	195	10	14.50
Tire Repairers and Changers	10	60	70	11	10.75
Floral Designers	15	25	40	10	10.75

Note: Occupations are ranked according to their concentration in the Retail Trade Cluster industries

Wages adjusted to reflect inflationary pressures through September 2004.

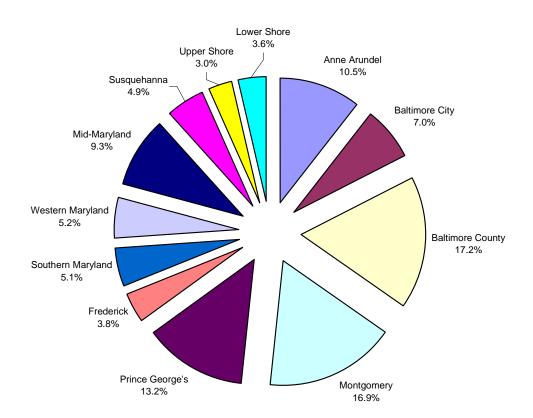
^{*}Estimates for Annual Openings, representing economy-wide demand for 2002-2012, are rounded to the nearest 5

Education and Training Categories

Occupations are classified into 1 of 11 categories by the Bureau of Labor Statistics based on analyses of the occupation's usual education and training requirements conducted while developing information to present in the *Occupational Outlook Handbook*. The 11 classifications are as follows:

- 1 First professional degree. Completion of the academic program usually requires at least 6 years of full-time equivalent academic study, including college study prior to entering the professional degree program.
- **Doctoral degree.** Completion of the degree program usually requires at least 3 years of full-time equivalent academic work beyond the bachelor's degree.
- 3 Master's degree. Completion of the degree program usually requires 1 or 2 years of full-time equivalent study beyond the bachelor's degree.
- **Bachelor's or higher degree, plus work experience.** Most occupations in this category are managerial occupations that require experience in a related nonmanagerial position.
- **Bachelor's degree.** Completion of the degree program generally requires at least 4 years but not more than 5 years of full-time equivalent academic work.
- 6 Associate degree. Completion of the degree program usually requires at least 2 years of full-time equivalent academic study.
- Postsecondary vocational award. Some programs last only a few weeks while others may last more than a year. In some occupations, a license is needed that requires passing an examination after completion of the training.
- **Work experience in a related occupation.** Some occupations requiring work experience are supervisory or managerial occupations.
- Long-term on-the-job training. This category includes occupations that generally require more than 12 months of on-the-job training or combined work experience and formal classroom instruction for workers to develop the skills needed for average job performance. This category includes formal and informal apprenticeships that may last up to 4 years and short-term intensive employer-sponsored training that workers must successfully complete. Individuals undergoing training are generally considered to be employed in the occupation. This category includes occupations in which workers may gain experience in non-work activities, such as professional athletes who gain experience through participation in athletic programs in academic institutions.
- Moderate-term on-the-job training. This category includes occupations in which workers can develop the skills needed for average job performance after 1 to 12 months of combined on-the-job experience and informal training.
- **Short-term on-the-job training.** This category covers occupations in which workers can develop the skills needed for average job performance after a short demonstration or up to one month of on-the-job experience or instruction.

Retail Trade Cluster - 2003



Employment and Wages in the Retail Trade Cluster By WIA and Select Local Jurisdictions

	Employment		Employment Numbe		Total	Average Weekly	
14/14			Change	Reporting Units	Wages	Wage	
WIA	2001	2002	2003	2001 - 2003	2003	2003	2003
Anne Arundel	28,622	9,202	30,912	2,290	1,730	\$782,980,454	\$487
Baltimore City	20,794	10,794	20,507	-287	1,899	513,254,619	481
Baltimore County	50,940	5,330	50,356	-584	2,643	1,273,495,141	486
Frederick	10,481	756	11,189	708	681	268,893,743	462
Montgomery	50,990	2,553	49,596	-1,394	2,688	1,389,953,114	539
Prince George's	39,080	10,019	38,757	-323	2,073	1,021,437,120	507
Lower Shore	10,318	1,185	10,577	259	854	217,398,091	395
Somerset	567	80	510	-57	61	10,738,054	405
Wicomico	6,066	991	6,341	275	399	131,244,444	398
Worcester	3,685	114	3,726	41	394	75,415,593	389
Mid Maryland	25,553	5,343	27,330	1,777	1,312	721,492,667	508
Carroll	6,717	1,098	7,175	458	, 510	154,458,782	414
Howard	18,836	4,245	20,155	1,319	802	567,033,885	541
Southern Maryland	14,215	3,104	15,118	903	924	336,237,064	428
Calvert	2,382	495	2,486	104	203	56,187,092	435
Charles	7,801	773	8,256	455	454	191,548,268	446
St Mary's	4,032	1,836	4,376	344	267	88,501,704	389
Susquehanna	15,303	2,513	14,258	-1,045	948	324,812,803	438
Cecil	3,544	549	3,522	-22	285	75,969,511	415
Harford	11,759	1,964	10,736	-1,023	663	248,843,292	446
Upper Shore	8,738	1,198	8,370	-368	782	186,210,776	428
Caroline	1,793	398	1,450	-343	107	36,607,668	486
Dorchester	1,106	406	1,053	-53	114	20,155,283	368
Kent	804	62	756	-48	101	14,812,666	377
Queen Anne's	2,202	173	2,264	62	206	48,715,527	414
Talbot	2,833	159	2,847	14	254	65,919,632	445
Western Maryland	14,911	2,936	15,146	235	1,049	302,535,355	384
Allegany	4,022	459	3,693	-329	308	64,823,708	338
Garrett	1,747	366	1,758	11	143	31,494,795	345
Washington	9,142	2,111	9,695	553	598	206,216,852	409
Nondistributable*	2,209	925	1,368	-841	418	76,072,550	1069
Maryland	292,154	55,858	293,484	1,330	18,001	7,414,773,497	486

^{*} Includes establishments in all Retail Trade Cluster NAICS industries that cannot be distributed geographically

